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ABSTRACT

The primary objective of this study was to test the validity of the American Library Association policy statement on Library Education and Manpower by applying it to the tasks described in Phase I of the Illinois Task Analysis Project. (Available as ED 040 723.) A Model was to be developed in which the tasks would be arranged in accordance with the definitions established in the policy statement, on the basis of the consultant's experience and judgement and bearing in mind the scaling of all appropriate factors by SERD (Social, Educational Research and Development, Inc.). This would be the exact process which would have to be followed by an administrator attempting to apply the new manpower policy in an individual library, and the result, besides serving as a test of the policy's validity, should also serve as a demonstration to administrators of how to make such application to positions in their own libraries. The study was based on public libraries. The list of tasks indicating the sort into categories upon which the report is based is an appendix to the study. (Related documents are LI 003 855, 003 857, and 003 858.) (Author/SJ)

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ED 067111

ILLINOIS TASK ANALYSIS PROJECT

PHASE II

A Study

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For

The Advisory Committee
Illinois Task Analysis Project
Mr. Thomas M. Brown, Chairman

September, 1971

LI 003 856

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Objectives of the Study

The primary objective of this study was to test the validity of the ALA policy statement on Library Education and Manpower by applying it to the tasks described in Phase I of the Illinois Task Analysis Project. A model was to be developed in which the tasks would be arranged in accordance with the definitions established in the policy statement, on the basis of the consultant's experience and judgment and bearing in mind the scaling of all appropriate factors by SERD (Social, Educational Research and Development, Inc.). This would be the exact process which would have to be followed by an administrator attempting to apply the new manpower policy in an individual library, and the result, besides serving as a test of the policy's validity, should also serve as a demonstration to administrators of how to make such application to positions in their own libraries.

Only public libraries were to be included in the study, and this was interpreted to include the State library agency, the processing center, and the system headquarters, as well as the individual public libraries included in Phase I of the project.

Formal job descriptions were not to be produced, since any such grouping of tasks into positions would involve knowing the quantity of such work to be performed in a given library or organizational unit, and this information was not available. Promotional lines from one grouping or level of tasks to another were to be indicated, however, since this is a major element in the manpower policy.

Methodology

Substantial and detailed review was made of the 1615 tasks described in Phase I of the project by SERD, and of their coding of the tasks by Functional Areas, General and Specific Tasks, and the scales of Performance Standards (II),

Task Environment (III), Worker Functions (IV), General Educational Development (V), Worker Instructions (VI), Training Time (VII), Time to Complete the Task (VIII), and Extraordinary Physical Demands (IX).

Two of the scales were ruled out at the very beginning as not having significant validity for the study: VIII - Time to Complete the Task, and IX - Extraordinary Physical Demands. The coding of General and Specific Tasks was not formally used, since the distinction was apparent from a reading of the tasks. It should be noted, however, that for the kind of task analysis attempted in Phase I, only specific tasks can be of use. The inclusion of so-called "general" tasks, actually clusters of tasks, contradicts the expressed objective of the analysis attempted. For reasons of practicality, however, both general and specific tasks were used in this study, with the breakdown of general into specific "assumed," or supplied without formally setting it down, on the basis of the analyst's experience with the duties as performed.

Two of the most important codings were not supplied: that listed in SERD's report as Scale X - Knowledge/Skills/Abilities, and the type of library in which the task occurred. For a study to be based entirely and reliably on the findings of Phase I, the Knowledge/Skills/Abilities factor is an absolute essential. In order to perform the study, it again had to be supplied, implicitly, from the analyst's experience. The absence of coding by type of library does not in any way affect the validity of the study, but the need to sort out all the tasks occurring only in school, college and university, or special libraries, added a great deal of unnecessary work and had serious impact on the useability of the machine runs.

It was apparent from the first line-by-line study of the tasks ordered by Training Requirements that there was going to be significant disagreement with SERD's

scoring, based largely on the missing Knowledge/Skills/Abilities factor, and also that a rather high proportion of the tasks were either duplicates or would be unuseable because of the ambiguity of their description. These problems, combined with the inability to sort by type of library, meant that any machine sort of the data would be not only cumbersome because of the inclusion each time of tasks in all types of libraries, but highly unreliable unless the scoring of all the scales were first reviewed, reevaluated, recoded and rerun.

It was therefore determined that the study would be based on a manual sort of the cards, with duplicates, unuseable descriptions, and tasks specifically identified or occurring solely in school, college/university, and special libraries excluded, and with ratings for individual tasks reappraised at each stage of their use.

Procedure and Findings

The first step was to eliminate from the 1615 tasks those not to be included in the study. Two hundred eighty-five (285) tasks were sorted out as specifically identified or occurring solely in school libraries, 164 as specifically identified or occurring solely in college/university libraries, and 70 as specifically identified or occurring solely in special libraries. Tasks identified or recognizable as occurring in the State library, processing center, and system headquarters were included in the study without separate treatment.

There was a fair number of tasks which could be either school or college/university, or both. The decision between the two was made arbitrarily, usually on the basis of vocabulary, but the resulting count may not be precise.

Ninety-five (95) tasks were eliminated as duplicates in this or subsequent sorts, and 114 as being unuseable. It may be useful to see examples of some occurring in the latter category. Most were determined to be unuseable because of

ambiguity or vagueness of description, which made it impossible to determine what the nature of the task really was; for example,

Determines records to be kept in public library

Provides technical assistance in non-professional areas to libraries in the system

Reviews and evaluates staff studies and revises or implements results

Approves proposals for new programs.

Others were simply not "tasks" by any definition, as

Maintains working climate conducive to staff morale and patron needs

Anticipates new problems and needs for library and develops programs dealing with problems before critical situations arise.

In the case of duplicates, the most specific or the most clearly stated version was retained.

Duplicate and unuseable tasks were not culled from those identified as belonging in excluded types of libraries.

This left 840 tasks as the universe of the study -- those occurring in the public library, including State agency, system headquarters, and processing center. Obviously many of these tasks are universal in libraries, occurring also in other types of libraries.

These tasks were then sorted into ten categories -- the nine established in the ALA policy statement on Education and Manpower and a tenth called, tentatively, "Custodial-Maintenance and others not included by definition in the statement."

1 Clerk

2 Library Technical Assistant

3 Technical Assistant

4 Library Associate

5 Associate Specialist

6 Librarian

7 Specialist

8 Senior Librarian

9 Senior Specialist

0 Custodial-Maintenance and Others

It rapidly became apparent that a number of additional categories would need to be inserted for sorting purposes. One was called Supervisory Clerical (as distinct from Library Technical Assistant). Another consisted of administrative or supervisory tasks which were multi-level, depending on where they occurred in the organization, as

Approves vacation and leave requests of staff

Makes annual evaluation of staff members

Conducts monthly staff meetings

Writes annual report of activities in department.

This group was ultimately eliminated from the study since they were unplaceable by category. Their existence should not be forgotten, however, in any further use of the task descriptions, since they are important elements of positions at several different levels.

A separate category was established for Audio-Visual in the first sort, but this was later eliminated and the tasks within it sorted by Functional Area and integrated with the others in the study.

A small category of self-development items was also separated out in the first sort, but later integrated or, in a few cases, excluded from the study.

Also separated in the first sort were a few tasks involving the transfer of work at the conclusion of a process. SERD viewed this transfer as a clerical operation, but in almost all cases it was simply a matter of the person who had performed the preceding step passing the work on to the next person, and these tasks were later integrated into the main body of the tasks with interpretation and evaluation based on the task which had just been completed.

Categories were also set up for Librarian or Specialist, Senior Librarian or Senior Specialist, and these were retained, since the tasks could appropriately be performed by either, depending on the staff-utilization pattern of the library. One was also inserted for Associate Specialist or Specialist, consisting largely of tasks which could be delegated by the Specialist to an assistant if the unit were large enough to justify a second position.

"Other" was found to consist of custodial-maintenance, truck or mobile-unit driver, and shipping room functions. Since tasks of this nature were not included in the policy statement, no further analysis was made of them.

Within most of the categories, the tasks were then sorted by Functional Area. This provides a good example of why a machine-sort based on SERD's codings would not be reliable. More than a third of the Clerical tasks allocated by SERD to Functional Area 2 (Selection and Acquisition) needed to be changed, most of them to 1 (Administration) or to 3 (Cataloging and Processing), or in some cases to 4 (Registration and Circulation). At this stage numerous additions were made to the Unuseable category (but included in the total given earlier) because of such problems as not being able to tell when "orders" referred to books or other media and when to supplies or equipment.

Similarly, about one-fourth of the Clerical tasks coded 3 were changed, and again duplicates became visible which had not been caught in the first sorting.

In Category 4 (Registration and Circulation) the problem arose of having tasks described involving several different kinds of charging systems. They were all left in, with the result that considerable duplication remains. There was much confusion in the placement of Interlibrary Loan functions, with SERD placing some in Category IV and some in Category VI - Reader Services. While either could be defended, they were all placed in Circulation for the sake of consistency.

Within several of the Functional Areas, with large numbers of tasks, subdivisions were established, as

Clerical: FA 1 (Administration)

- Unskilled Clerical
- Simple Machine Operation
- Typing
- Secretarial
- Switchboard
- Supplies
- Personnel and Payroll
- Fiscal

Clerical: FA 3 (Cataloging and Processing)

- General Processing
- Newspaper Processing
- Physical Preparation

Clerical: FA 4 (Registration and Circulation)

- Registration
- Circulation
- Overdues/Fines
- Shelving
- Reserves
- Interlibrary Loan

The Technical Assistant category, although small enough numerically that it was not sorted by Functional Area, was divided in order better to see its composition, e.g.

Audio-visual Equipment

Data Processing

Microfilming

Printing

Photography

Other

Similarly, Specialist was divided into:

General Management

Personnel

Public Relations

Computer

Audio-Visual

No tasks were placed in the Senior Specialist category, probably a result of the size of the libraries included in the study.

Senior Specialist or Senior Librarian was divided into

Professional

General Management

Buildings/Architecture

Budget/Fiscal.

CHART A

Distribution of Tasks

School Libraries		285
College/University Libraries		164
Special Libraries		70
Other		
(Custodial-Maintenance, Driver, Shipping Room)		29
Multi-Level Supervisory		18
Unuseable		114
Duplicates		95
Total not used in study		775
Clerical: FA 1 - Administration		
Unskilled Clerical	11	
Simple Machine Operation	25	
Typist	10	
Secretarial	11	
Switchboard	1	
Supplies	8	
Personnel and Payroll	15	
Fiscal	18	
Total Administration		99
FA 2 - Selection and Acquisition		57
FA 3 - Cataloging and Processing		
General Processing	51	
Newspaper Processing	3	
Physical Preparation	16	
Total Cataloging and Processing		70
FA 4 - Registration and Circulation		
Registration	6	
Circulation	31	
Overdues/Fines	17	
Shelving	13	
Reserves	9	
Interlibrary Loan	21	
Total Registration and Circulation		97
FA 5 - References Services		1
FA 6 - Patron Services		6
FA 7 - Collection Maintenance		27
FA 8 - Facility Maintenance		3
Total Non-Supervisory Clerical		360
Supervisory Clerical:		27

CHART A - continued

Library Technical Assistant:

FA 1 - Administration	0
FA 2 - Selection and Acquisition	21
FA 3 - Cataloging and Processing	33
FA 4 - Registration and Circulation	3
FA 5 - Reference Services	1
FA 6 - Patron Services	2
FA 7 - Collection Maintenance	11
FA 8 - Facility Maintenance	0
Total Library Technical Assistant	71

Technical Assistant:

Audio-Visual	14
Data Processing	7
Microfilming	5
Printing	5
Photography	4
Other	2
Total Technical Assistant	37

Library Associate: 14

Associate Specialist: 15

Associate Specialist or Specialist: 15

Librarian:

FA 1 - Administration	10
FA 2 - Selection and Acquisition	36
FA 3 - Cataloging and Processing	19
FA 4 - Registration and Circulation	6
FA 5 - Reference Services	5
FA 6 - Patron Services	33
FA 7 - Collection Maintenance	10
FA 8 - Facility Maintenance	0
Total Librarian	119

Specialist:

General Management	8
Personnel	26
Public Relations	18
Computer	8
Audio-Visual	7
Total Specialist	67

CHART A - continued

Librarian or Specialist:		24
Senior Librarian:		
FA 1 - Administration	28	
FA 2 - Selection and Acquisition	8	
FA 3 - Cataloging and Processing	3	
FA 6 - Patron Services	2	
FA's 4,5,7,8	0	
Total Senior Librarian		41
Senior Librarian or Senior Specialist:		
Professional	5	
General Management	19	
Buildings/Architecture	12	
Budget/Fiscal	14	
Total Senior Librarian or Senior Specialist		50
TOTAL - All Tasks Used in Study		840

SUMMARY OF DISTRIBUTION OF TASKS USED IN STUDY

Non-Supervisory Clerical	360
Supervisory Clerical	27
Library Technical Assistant	71
Technical Assistant	37
Library Associate	14
Associate Specialist	15
Associate Specialist or Specialist	15
Librarian	119
Specialist	67
Librarian or Specialist	24
Senior Librarian	41
Senior Librarian or Senior Specialist	50
TOTAL - All Tasks Used in Study	840

* * *

As the next stage of the study the tasks, thus arranged, were reviewed in the light of SERD's scaling of the following factors:

VII - Training Time

V - General Educational Development

A - Reasoning

B - Mathematics (only for those in which it was likely to be a significant factor)

C - Language

VI - Worker Instructions

II-A Performance Standards - Who or What Sets the Standards

III - Task Environment

The Training Time factor was obviously the most significant in terms of the objectives of the study, and although it was known that the correlation was high between Factors VII and V, General Educational Development (GED) was reviewed simply as a cross-check on SERD's evaluations.

Scale VIII (Time Required to Complete the Task) and IX (Extraordinary Physical Demands) had earlier been eliminated, and Scale V-B (Mathematics) was so obviously not significant in most tasks that it was used only in categories where it seemed likely to be required.

Scale IV (Worker Functions: Data, People, Things) was included experimentally, but the scattering was so widespread that it was meaningless for the purposes of this particular study. This factor would have great importance, however, in actually grouping tasks into jobs, and a careful analysis of it for all the tasks performed in libraries would surely be of interest to those concerned with recruitment and selection of library staff at all levels, and with their educational preparation and on-the-job training and development.

Scale II-B (Quality Required) was excluded because, for the purposes of this particular study, the variation of error permitted was meaningless unless

accompanied by a rating of the consequence of error. As illustration, Task 1150, "types multilith masters" and Task 1368, "manages and controls budget, including major expenditures and transfer of budgetary items" are both, accurately, coded 1 - "error-free quality (or very, very close to it) is required"; but the difference in level is considerable.

II-C (Are Standards Written or Unwritten?) and II-D (Pace or Productivity) were excluded; again, because they say nothing about level of work or educational requirements.

The codings as listed in Chart B represent the range, or predominant or characteristic valuations, and where one or more occurred with considerably greater frequency than the others listed, these are underlined.

The scalings used here are essentially SERD's. A few changes were made for individual tasks in cases of marked disagreement, but in no instance was the range for a category affected by this.

CHART B appears on pp. 14-16.

CHART B

Review of SERD[1/] Scales by Position Categories

Position Categories	Scale VII	Scale V			Scale VI	Scale II-A	Scale III
		A	B	C			
Clerical:							
FA 1 - Administration							
Unskilled Clerical	1-4	1-3	-	1-3	1-2	2-3	2-3
Simple Machine Operation	1-4	1-3	-	1-3	1-2	3	2-3
Typing	4,5	2-3	-	3-4	2	2-3	2-3
Secretarial	3,4,5,6	3-4	-	3-4	1-2	2-3	2-3
Switchboard	3	2	-	3	1	3	2
Supplies	4,5	2-3	-	3-4	2,3,4	2-3	2-3
Personnel and Payroll	3-6	3-4	-	3,4,5	2-4	3	2
Fiscal	4-6	3-4	3-5	3-4	2-4	2-3	3,9,10,12
FA 2 - Selection and Acquisition	1-4	1-4	-	1,2,3,4	1,2,3	2-3	2, 3,12
FA 3 - Cataloging and Processing							
Regular Processing	1-4	1,2,3	-	2,3,4	1-2	2-3	2,12
Newspaper Processing	1-3	1	-	1,2	1	2-3	2
Physical Preparation	1,4	1-4	-	3,5	1-2	2-3	2-3
FA 4 - Registration and Circulation							
Registration	4	2-3	-	3-4	1-4	2,3	2,3,10,12
Circulation	1-4	1-3	-	1,2,3,4	1-4	2,3	1,2,3,7, 10,12
Overdues/Fines	3,4,5	1-3	-	2-4	1,2,3,4	2,3	2,3,5,8 ,9,12
Shelving	1,3,4	1-3	-	2-3	1,2,3	3	2
Reserves	4	2-3	-	2,3,4	2	3	2
Interlibrary Loan	1-4	1,2,3,4	-	2,3,4	1,2,3	2-3	2-3
FA 5 - Reference Services	4	2	-	3	3	3	4
FA 6 - Patron Services	3-4	1,2,4	-	2,3	1-2	2-3	1-3
FA 7 - Collection Maintenance	1-4	1-3	-	1-3	1-2	2-3	2-3
FA 8 - Facility Maintenance	1-4	1-3	-	3	1,2	2-3	2-3
Supervisory Clerical	5-7	3-4	-	3,4,5	4-6	3	2,4,5,7,9, 10,12

[1/] Please see SERD Report, pp. 25-33 for complete description of scales used.

CHART B - continued

Position Categories	Scale VII	Scale V			Scale VI	Scale II-A	Scale III
		A	B	C			
Library Technical Assistant:							
FA 2 - Selection and Acquisition	4,5,6	3-4	-	3,4,5	2-4	3	2,3,4,7,8,10,12
FA 3 - Cataloging and Processing	4-6	2,3,4	-	3-5	2,3,4,5	3	2,3,4,7,10,12
FA 4 - Registration and Circulation	5	3-5	-	4	3,4	3	4,8,10
FA 5 - Reference Service	5	3-4	-	4-5	3	3	3,10
FA 6 - Patron Service	5	3-5	-	4	3-4	3	3,4,8,10
FA 7 - Collection Maintenance	4-6	3-4	-	3-5	2,3,4,5,6	2-3	2,3,4,9,10
Technical Assistant:							
Audio-Visual	4-6	2-4	2,3	3,4	2-6	2-3	10,12 2,3,4,9,
Data Processing	5	2-4	2,3	4	1,4,6	2-3	3,12
Microfilming	3-5	3	2	2-5	2	2-3	2,3,10,12
Printing	4-5	2-4	2,3	3-4	2,3,4	2-3	2,3,4,7
Photography	3-4	2-3	2	3	2,3	3	2,3,9
Other	4,6	2-4	2,3	5	2-5	3	3,10
Library Associate	4-6	3-4	-	4-6	2-5	2,3	2,3,6,7,10,12
Associate Specialist	4-6	3-5	-	3-5	2-6	3	1,2,3,4,7,9,10,11,12
Associate Specialist or Specialist	4,5,6,7	3-4	3	4,5,6	4-6	3	2,4,5,7,10,11
Librarian:							
FA 1 - Administration	6,7	4,5	-	4,5	4,5,6,7	2-3	4,7,9,10
FA 2 - Selection and Acquisition	5,6,7,8	4,5	-	4-6	4,5,6,7	2-3	3,4,7,9,10
FA 3 - Cataloging and Processing	5-7	4-6	-	4-6	3-7	3	2,3,4,5,7,9,10
FA 4 - Registration and Circulation	5-6	4-5	-	4-5	4-7	3	4,9,10
FA 5 - Reference Services	5-7	4-5	-	4-5	3,4,5	3	2,6,7,9
FA 6 - Patron Services	5,6,7	4-5	-	4-6	4,5,6,7	3	4,5,6,7,9,10,11
FA 7 - Collection Maintenance	5,6,7	4-5	-	4-5	2,4,6,7	3	4,9,10

CHART B - continued

Position Categories	Scale VII	Scale V			Scale VI	Scale II-A	Scale III
		A	B	C			
Specialist:							
General Management	7,8	4,5	4,5,6	5-6	5,7,8	3	4,7,9,10,12
Personnel	6-8	4,5,6	3-6	4,5,6	4-8(6)	2,3	2,4,7,9,10
Public Relations	5,6,7	4,5	2-3	4,5,6	4,6,7	2,3	4,7,9,12
Computer	5,6,7	4,5	6	4,5	1,4,5,6,7	3	2,4,10,12
Audio-Visual	6,7	3,4,5	2-6	4,5	6	2,3	2,4,7,10
Librarian or Specialist	6,7	4-5	2-5	4-6	4-8(6)	1,3	3,4,5,7,9,10 & 11
Senior Librarian:							
FA 1 - Administration	6-8	4,5,6	-	5,6	4-8	3	4,5,7,8,9,10
FA 2 - Selection and Acquisition	6-8	5	-	4-6	4,6,7,8	3	4,7,9,10
FA 3 - Cataloging and Processing	7-8	5,6	-	6	7	3	9,10
FA 6 - Patron Services	6,7	4,5	-	5,6	4,7	3	4
Senior Librarian or Senior Specialist:							
Professional	7,8	5,6	3,5,6	6	6,7	3	4,9,10
General Management	6,7,8	4,5,6	3-5	6	5-8	2,3	4,7,9,10,12
Buildings/Architecture	6,7,8	5-6	3,5	5,6	4-8	2,3	9,10
Budget/Fiscal	6,7,8	5,6	5	5,6	5,6,7,8	2,3	3,4,7,9,10

Analysis of the SERD scales revealed the following:

Scale VII - Training Requirements: The characteristic range for Clerk positions was 1-4, with a few 5's, thus fitting easily the policy statement's requirement of high school graduation. The tasks described as Secretarial, Fiscal, and Personnel and Payroll had a somewhat higher 3-6 range, with Typing and Supplies positions and those in Functional Area 4 concerned with Overdues/Fines in a 3-5 range. Those called Supervisory Clerical ranged from 5 to 7.

Tasks placed in the Library Technical Assistant category fell in the 4-6 range, with most at the 5 level, and those grouped as Technical Assistants ranged from 3-6. While not going much beyond the level of high school graduation there was, at least, a visibly and consistently higher requirement here than for most of the Clerk positions.

Tasks grouped under both Library Associate and Associate Specialist also fell in the same 4-6 range, with only a few in the Associate Specialist or Specialist category going as high as 7. This would seem not quite to match the requirements established by the policy statement.

Librarian tasks had a 5-7 range, with a few stray 8's, rather than the clear-cut 7 one might have wished for, and the Specialists were the same, with a few more 8's. Again, however, there was a clear line of differentiation between these positions and the nonprofessional ones.

The Senior-level positions, Librarian or Specialist, were all in the 6-8 range, again consistent with each other and a cut above the journeyman-level tasks in their categories.

Scale V - General Educational Development: A similar gradual upward progression was visible on Scale A (Reasoning), with the Clerks ranging 1-3, with the exceptions again of Secretarial, Fiscal, and Personnel and Payroll, which ranged 3-4, as did the Supervisory Clerical. The Library Technical Assistants ranged generally 3-4, with an occasional 5, but the range for Technical Assistants was only 2-4. The Associates (both Library and Specialist) also struck a 3-4 level, with a few 5's. The Librarians hit a consistent 4-5, as did the Specialists with a few stray 3's and 6's. The Senior levels ranged 4-6, with a predominance of 5's and 6's.

Scale B (Mathematics) was tabulated for only a few categories, with "high school mathematics" required only in the Fiscal grouping among the Clerks. "Highly specialized mathematics" was required for no task listed. "Elementary college mathematics" was required for a variety of Specialist tasks and in all Senior-level groupings, but was dominant only in the Computer group.

Scale C (Language) again showed a gradual rise from 1-3 for the Unskilled Clerical, to 3-4 for most tasks in the Clerk category. Level 5 ("Post high-school and linguistic experience") began showing up in the Library Technical Assistant tasks, but not as frequently in those of Technical Assistants. It was only at the professional level (Librarian and Specialist) that 6's ("Considerable education and linguistic experience") appeared with any frequency and they became more dominant at the Senior level.

Scale VI - Worker Instructions: Level 5 ("the worker is expected to know and employ theory...") did not occur until the Supervisory Clerical and Library Technical Assistant levels, and it occurred in only two of the six Functional Area groupings of LTA's. It occurred spottily among the Technical Assistants. Level 6 ("requires some creative use of theory well beyond referring to standard sources...") occurred occasionally among Supervisory Clerical, Library Technical Assistant, Technical Assistant, and Associate Specialist, but became dominant only at the Librarian level. It was here also that Level 7 (worker must define need or problem) appeared for the first time. Tasks at the Specialist level ranged widely, from 4-8, with 6 probably the most frequent level. All tasks at the Senior levels included some 7's and 8's, but again with a scattering of lower levels.

Scale II-A - Who or What Sets the Standards?: With the exception of three tasks coded 1 ("the worker"),[2/] all were coded either 2 ("other") or 3 ("outside criteria"). The 3's became dominant in Supervisory Clerical, Library Technical Assistant, Associate, Librarian, Specialist, and Senior categories.

Scale III - Task Environment: Most Clerk tasks were coded 2-3 ("repetitive, short cycle operations" performed "under specific instructions.") Those in the Administrative: Fiscal category, however, were significant exceptions, as were those in all the "over-the-desk" Registration and Circulation tasks. Beginning at the Supervisory Clerical/Library Technical Assistant levels, there was a wide mix, with 3 dropping out, with rare exceptions, at the professional levels.

2/ Two self-development items and one questionable one.

Conclusions and Recommendations

Without exception, the tasks included in the study were those traditionally performed in libraries, traditionally described. They fell easily into the categories established in Library Education and Manpower. The line between Clerk and Library Technical Assistant was clear and followed the definitions established by the policy statement and the several Deininger Committee reports. 3/ Groupings of tasks emerged which logically could be described as Technical Assistants, Associates, and Specialists. There was no difficulty in determining the base line for tasks which were professional - either Librarian or Specialist.

The check against the five SERD scales revealed a structure roughly resembling that described in the policy statement.

CHART C

	Clerk	L T A	T A	Assoc.	Lib.	Spec.	Sr. Lib./ Sr. Spec.
8							x x
7					x x	x x	x x
6		x	x x	x xx	x xx	x xx	xxxx
5		x xx	x xx	x xx	xxxx	xxxx	xxx
4	x xx	xxxx	xxxx	xxxx	xxx	xxx	x
3	xxxx	xxx	xxxx	xxx			
2	xxxx	x	x x	x			
1	xxxx		x				

The first column of x's in each category represents the predominant coding for Scale VII; the second, Scale V-A; the third, V-C; and the fourth, Scale VI. Scales II-A and III do not lend themselves to this type of representation.

3/ See ALA Bulletin 62: 387-97, April, 1968; and "Criteria for Programs to Prepare Library/Media Technical Assistants," approved by the Board of Directors of the Library Education Division, American Library Association, June, 1971.

In any consideration of SERD's scales, it must be remembered that Scale X - Knowledge/Skills/Abilities Required is lacking. If present, this would undoubtedly create a sharper differentiation among the categories.

Before accepting this tentative fit, however, several other observations need to be made:

(1) A very high proportion of the tasks included in the study were clerical (46% including Supervisory Clerical).

(2) A significant number of the clerical tasks in the Administrative area, particularly in the Secretarial, Fiscal, and Personnel and Payroll subdivisions, were in the LTA rather than Clerical ranges on several of the SERD scales (most notably VII and V-A and C).

(3) A primary factor in raising either a Librarian or Specialist position to the Senior level was administrative responsibility, with size of unit or library a dominant factor.

(4) Although LTA/TA and Library Associate/Associate Specialist tasks were rated at similar levels on SERD's scales, the latter are by their nature tasks assignable to trainees or assistants, while the former grow out of similar work performed at lower levels.

(5) SERD's scales do not include the accountability or level of responsibility factor. Nor is there any weighting of factors to indicate relative importance.

A synthesis of all of these factors suggests that, on the basis of the tasks described in this study, the following career structure would be appropriate:

Level 1 — Clerk

Including all those tasks matching the general definition supplied by the policy statement and ranging generally in the 1-4 levels of SERD's scales VII, V-A and C, and VI.

Level 2 — Library, Technical, and Administrative Assistants

Including all those tasks matching the general definition supplied by the policy statement and here sorted into LTA and TA categories, plus those separated experimentally as Supervisory Clerical, plus those in Fiscal, Secretarial, and Personnel and Payroll categories which range beyond the Clerk level in SERD's codings.

Also at Level 2 — Associates - both Library and Specialist

As defined in the policy statement and evaluated in this study.

Level 3 — Librarian/Specialist

As defined the policy statement and evaluated in this stu.

Level 4 — Senior Librarian/Senior Specialist

As defined in the policy statement and evaluated in this study.

The qualification requirements (apart from personal attributes) for these levels would be as follows:

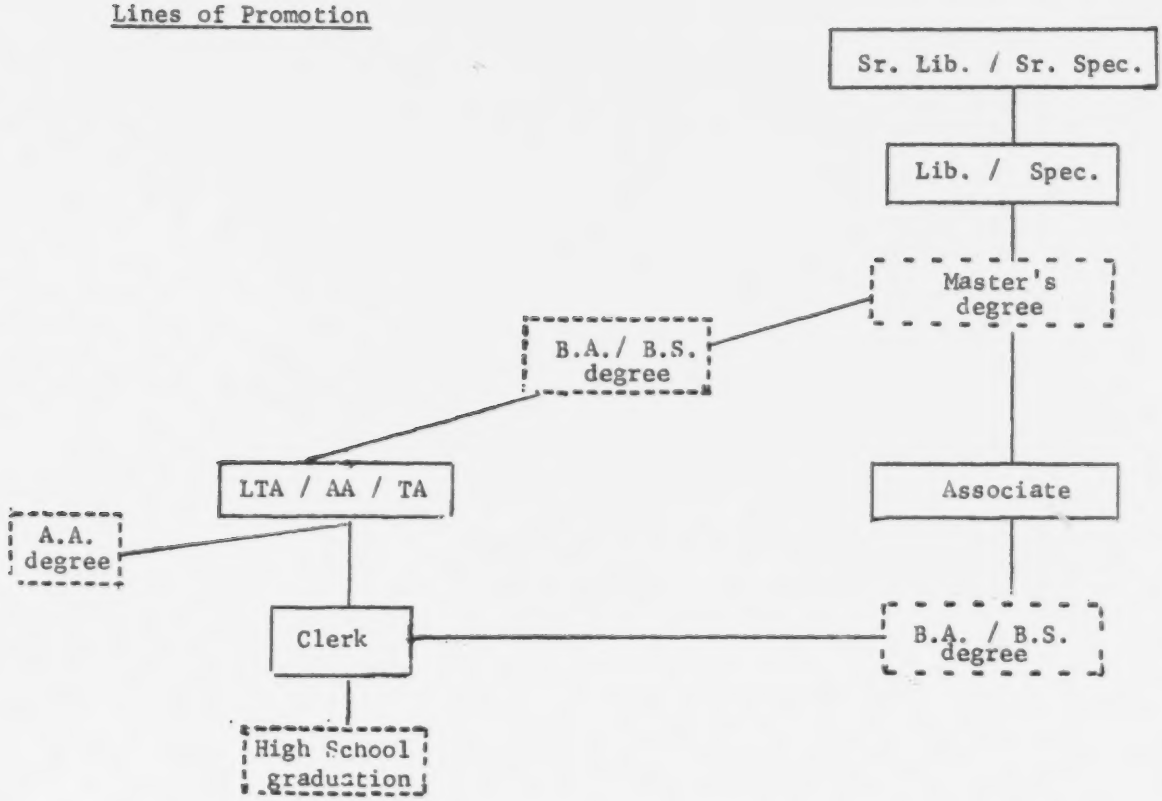
Clerk:	High School graduation the basic requirement, plus requisite skills in typing, etc. as required by particular positions (may be acquired in high school, business school, on-the-job training or by other means).
Library, Technical and Administrative Assistants:	High school graduation plus the particular skills, knowledges, and judgment required by particular positions. These may be acquired through experience, in-service training or formal post-high school instruction in appropriate areas, and, most usually and most desirably, through a combination of these.
Associates:	B.A. or B.S. degree (with or without library science courses, as appropriate for particular positions).
Librarian:	M.L.S. degree.
Specialist:	Master's degree in field of specialization or bachelor's degree in appropriate field plus significant related experience (in or outside of libraries).
Senior Librarian:	M.L.S. degree, considerable breadth and depth of library experience, plus additional formal study, with (for the tasks described in this study) strong emphasis on management. A master's degree in management or other appropriate related field highly desirable.

There were no Senior Specialist tasks identified in this study. For those called "Senior Specialist or Senior Librarian," the requirements are essentially the same as for Senior Librarian - substantial experience on the base of a master's degree in the primary discipline, plus advanced formal study in a "cross" field.

The resulting structure of career progression would thus take the following approximate shape:

CHART D

Lines of Promotion



How, then, does this compare with the recommendations of the policy statement on Library Education and Manpower?

1. There is complete agreement with the policy statement's definition of Clerk and its educational requirements. The pulling out of the upper ranges of some of the administrative tasks into an Administrative Assistant category is important, however. Because such tasks are smaller in number than those of similar levels of difficulty in the bibliographic area, they tend to be less visible and thus are viewed as "just clerical." Such duties as control of the library's accounts or its personnel record-keeping (including position and budgetary control, as well as the entire complex of salary increments, service ratings, etc.), along with the important interpersonal relationships involved, or serving as secretary to the director of the library, including supportive services to his relationship with the library board, require a very high level not only of skill, but of organization, responsibility, and above all, judgment. They fully merit recognition at a level equivalent to that of the Library Technical Assistant.

2. There is complete agreement with the policy statement's definition of Library Technical Assistant, so far as the nature of the tasks performed is concerned, and strong support for the removal of such tasks from the Librarian level. Serious question is raised, however, regarding the educational requirements, especially as accompanied by the statement, "The Technical Assistant categories... are not meant simply to accommodate advanced clerks." While Clerks are not excluded by the policy statement from moving to the LTA level (indeed, the career-lattice diagram indicates this as a line of promotion for them), the basic requirements established for the level recognize only formal study, not the learnings which come through experience.

What is being recommended here is that primary recognition be given to valid related experiential learning, with the two-year college program still recognized as

an alternative but not necessarily a more desirable mode of entry. The advanced clerk should indeed be strongly encouraged (or in some cases required) to undertake formal course work to assist in his development to the LTA level. Courses directly concerned with library techniques might well provide a valuable synthesis and overview of that which he has learned on the job. Or, even more profitably, he might take courses in supervision, or in computer applications to library processes, or some other subject which has not been taught in the course of his clerical assignments.

There are two reasons for this emphasis on stronger recognition of experience as a qualification for promotion to the Library Technical Assistant level. One is the nature of the LTA tasks themselves, and the other is the high proportion of library tasks which are clerical.

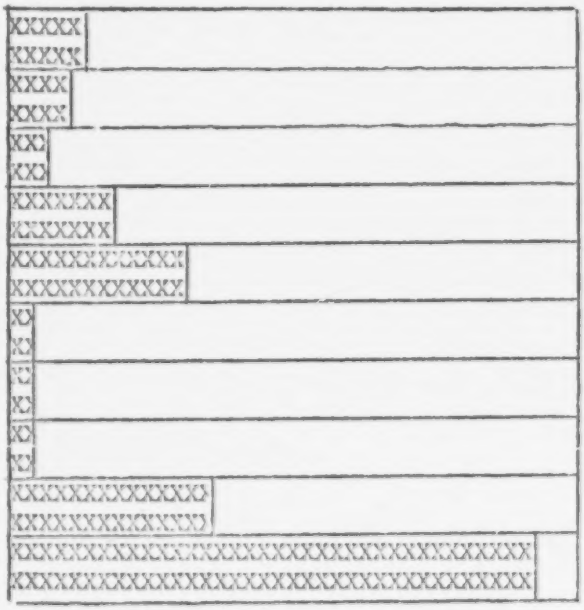
The LTA tasks represent the highest level on a continuum and are different from the tasks immediately below them in the Clerk category only in degree of complexity. Those tasks requiring the kinds of knowledge provided by general education are already excluded from this category. It would therefore seem that an able clerk, after a number of years of well planned, well evaluated, well supervised experience would be the natural candidate for advancement to the LTA level, and would bring to his performance a more substantially based judgment.

In analyzing any career structure, the amount of work to be performed, or the number of staff employed to do it, at any level, is also of significance. For example, the career line of a photographer in a typical library is extremely short; there just is not that much photography to be performed. There need to be more ladders up from a category containing two hundred positions than from one including twenty. This kind of quantitative information was not provided in the Phase I document, and it is not altogether safe to use the total number of tasks in any one

category as a criterion. Some of the tasks described are very simple and specific, requiring only a few minutes to perform, while others are complex and general, almost unmeasurable in terms of time requirements. Nevertheless, the ratio represented by such a mechanical count can provide insights.

	No. of Tasks	% of Total
Sr. Lib. or Sr. Spec.	50	(6.0%)
Senior Librarian	41	(4.9%)
Librarian or Specialist	24	(2.8%)
Specialist	67	(8.0%)
Librarian	119	(14.5%)
Assoc.Spec. or Specialist	15	(1.8%)
Associate Specialist	15	(1.8%)
Library Associate	14	(1.7%)
TA,LTA,Superv. Clerical	135	(16.0%)
Non-Supervisory Clerical	360	(43.0%)

CHART E



Numerically, the clerks are the backbone of the library staff, and to cut off their primary promotional line by the insertion of another category, itself sharply limited in upward potential, does a serious disservice to both. There is a good numerical ratio between the two levels, however, if one is regarded as the natural base for the other.

While the policy statement does not actually rule out the kind of advancement proposed here, neither does it expressly permit it, and it is apparent in the field that instead of relieving the denigration of clerical work long prevalent in libraries, the recognition of the LTA category has added another layer of staff to join in it.

3. There is no disagreement with the definition or educational requirements established by the policy statement for Library Associate/Associate Specialist, but there is disagreement with its placement as a category. The SERD scales place it on an exact par with the Technical Assistant level, and this is where it belongs. It is, at least so far as the tasks included in this study are concerned, purely and simply a trainee level. While the duties require the general education represented by the bachelor's degree, they do not require experience nor are they at the level of responsibility represented by the LTA/TA/AA tasks.

4. The Librarian category produced no problems or disagreement.

5. The Specialist category is one which has long needed the formal recognition in libraries which the policy statement now provides. The master's degree established as the basic requirement by the policy statement is highly desirable and should be strongly encouraged. It is for the most part completely justified by the tasks described here. The only reason for proposing the possible alternative of bachelor's degree in the field of specialization plus significant related experience is that all of the fields represented do not parallel precisely the educational patterns established for librarianship, and there are many conceivable situations, particularly in libraries of the size and type represented here, in which otherwise highly qualified persons would not meet the formal requirement of a master's degree. What is probably most important in these positions, along with basic professional competence, is the capacity to understand and relate to the concerns of libraries, and this, in a sense creates a dual demand to start with. The requirement of significant related experience beyond the bachelor's degree balances the MLS without experience required of the Librarian.

6. There was complete agreement with the policy statement at the Senior Librarian/Senior Specialist level. The tasks placed in the Senior Librarian category were largely at the policy level and almost entirely administrative in nature. Those described as Senior Librarian or Senior Specialist represented high levels of responsibility which could be assumed by librarians or specialists, depending on such variables as: (1) whether the library had a business manager, for example, or the library director handled the budget-making process directly; (2) interpretation of the task (for example, "checks and evaluates library programs in relation to professional standards," which could be done by a librarian for the library's programs of public service or by a personnel specialist for the library's personnel programs); (3) functions for which responsibility could rest with either librarian or specialist, but which by their very nature involve close coordination (as between public relations specialist and librarian in "monitors and supervises staff presentations related to library programs on radio station."). The flexibility of educational requirements provided by the policy statement at this level was particularly appropriate, since practically all of the tasks included here would call for advanced study in other areas rather than an additional degree in library science.

7. Movement among categories is perhaps not indicated with complete clarity by either this study or the policy statement. The inclusion here of the category Associate Specialist or Specialist provides an example in which the tasks would be performed by the Specialist if he had no assistant, but which could well be delegated to one just entering or seeking to enter the field of specialization. Similarly, although not formally indicated, the line between Librarian/Senior Librarian or Specialist/Senior Specialist would be drawn in different places depending on the size of the library or unit, or the stage of development of the incumbent of the position. These shadings can be seen more clearly in actual practice, involving

total positions, not isolated tasks, and actual incumbents, not theoretical "categories of manpower." This is the essence of intelligent manpower utilization. Suffice it to say here that no task should be considered immutably, at all times and places, to be in one category or another, at one level or another. To interpret either this or similar studies, or the policy statement itself, thus literally and inflexibly would be the surest way to cut off growth and development of staff.4/

There are, in fact, two distinct career services, separated by a very firm line which can be crossed only through the attainment of the level of general education represented by the bachelor's degree. On the one side are the positions beginning with Clerk and rising to the top levels of the LTA/TA categories. With a number of grades within each category, this constitutes a viable career structure for high school graduates, who should be expected to improve their skills and broaden their educational backgrounds as they move to positions of greater responsibility. On the other side is the professional structure, beginning with Associate or trainee positions, reaching the professional level with the attainment, in most cases, of the master's degree, and continuing to rise on the basis of increasingly higher levels of responsibility, accompanied by continuing education appropriate to the position requirements.

This essentially is both the pattern established in the policy statement and the one recommended by this study.

4/ This is undoubtedly what is intended by the various arrows on the career lattice diagram (Figure 2) of the policy statement. Yet somehow these arrows create confusion, because they imply a freedom of upward movement not actually possible except as educational requirements are met at each stage of advancement. Similarly, the horizontal arrows indicating lateral movement - between Library Technical Assistant and Technical Assistant, Librarian and Specialist, Senior Librarian and Senior Specialist - seem to be in conflict with the concept of specialization built up through the series of educational requirements.

The principal line of disagreement is between the policy statement's emphasis on academic achievement as the "single best means for determining that an applicant has the background recommended for each category" and the point of view of this study that experience - - guided, planned, and evaluated experience - - is, for several of the categories, a factor of at least equal importance.

The strict adherence to formal educational standards is easier for an administrator, but in the flux of daily practice and staffing needs, and particularly in the light of the diverse array of talents represented on any staff, other factors will always need to be considered.

The policy statement is concerned with categories of manpower, and the approach of this study is through tasks performed. It is, in the final analysis, the work performed which is at one level or another, and the ultimate test of the individual's qualifications is not the precise amount of pre- or in-service training or experience per se, but the totality of both as expressed through performance.

* * *

Once again, it must be emphasized that this study is based on the tasks performed in a specific group of small- to medium-sized public libraries, as described in the Phase I document of the Task Analysis Project. No metropolitan public libraries, school, special, college or university libraries were included. While the methodology may be applied to tasks in any library, the model and recommendations will not have universal application.

APPENDIX

Arrangement of Tasks by Categories

The following list of tasks is provided solely to indicate the sort into categories upon which the preceding report is based. The task descriptions are exactly as provided by SERD, with no attempts to edit. Within categories, and subdivisions thereof, there is no particular order, either by level of difficulty or by internal relationship of the tasks to each other.

In preparing the Appendix for typing, a few more duplicates were discovered and removed, and several tasks were shifted in location. The numbers may therefore not quite agree with the summary given on pages 9-11 of the report, but none of the changes alter the basic findings or recommendations.

Categories — Page

Clerical 32
Supervisory Clerical 44
Library Technical Assistant 44
Technical Assistant 48
Library Associate 49
Associate Specialist 50
Associate Specialist or Specialist 50
Librarian 51
Specialist 55
Librarian or Specialist 58
Senior Librarian 58
Senior Librarian or Senior Specialist..60

CLERICAL

FA 1 - Administration

Unskilled Clerical

Picks up mail daily and delivers to dept.
Packages books & materials for mail shipment
Maintains scrapbook files of all printing produced in Print Shop
Selects envelope size and/or labels needed to prepare for mailings as requested
Gathers materials to be contained in large mailings & inserts in prepared envelopes
Opens mail & stamps with date due stamp
Operates, using cart, interlib. mail service by delivering titles, memoranda, mail, etc., to offices within Lib.
Maintains files of multilith masters and stencils
Distributes supplies on carts to requesting unit or individual
Maintains files of completed order forms

Simple Machine Operation

Operates automatic paper punch
Operates paper collater
Operates automatic stapling machine
Operates multilith machine to produce copies from masters
Services office machines by replenishing paper, ink, toner, etc.
Operates paper folding machine
Operates envelope stuffing machine
Operates addressograph machine to produce required mailing addresses after selecting correct setting
Operates mailing machine to affix proper postage to pieces of mail
Operates glueing machine
Cleans and maintains glueing machine by performing simple maintenance & cleaning processes
Cleans office machines weekly (i.e., mimeograph, multilith, etc.) to keep in good operating condition
Operates electric adding machine
Operates keypunch machine
Operates microfilm reader printer
Operates electrically driven book cart
Operates plastic laminator
Operates paging system
Operates ditto machine
Monitors tape decks & when malfunctions occur, calls technician
Operates splicing machine
Operates IBM Copier to produce color transparencies
Operates binding machine to attach prescribed covers & plastic bindings to large reports or materials
Cuts paper & card stocks of varying thicknesses by using guillotine or other machine

Typist

Types multilith masters
Maintains mailing list by producing address plates on Addressograph machines
Types mimeograph stencils
Types mailing labels for member libs.
Makes corrections on typed copy as directed by proofreader
Types from rough drafts, letters, manuscripts, etc.
Types materials received from supervisor via handwritten forms, memos, or dictation equip.
Types from prepared draft information on purchase order form and gives completed form to supervisor for inspection
Operates TWX machine by sending & acknowledging receipt of messages
Maintains TWX machine by loading tapes, paper, & ribbon

Secretarial

Opens & sorts mail delivered to Director
Delivers opened mail to supervisor
Maintains files for Director's office
Takes stenographic notes of Board meeting
Transcribes & types minutes of Board meetings from stenographic notes
Screens salesmen
Maintains Director's appointment calendar
Answers supervisor's telephone & refers calls &/or takes messages
Takes dictation from supervisor using shorthand, notehand, etc.
Maintains files on all insurance programs for lib.
Mails to Board members monthly financial report prior to Board meeting

Switchboard

Operates telephone switchboard

Supplies

Checks periodically library & office supplies & maintains inventory by ordering supplies from Purchasing dept.
Keeps disposition record of supplies in lib.
Files approved copy of purchase orders
Prepares purchase orders
Checks invoice vouchers for mathematical errors before sending to supervisor for approval
Checks received materials against packing slip, initials packing slip & sends to billing
Identifies incomplete orders and: (a) writes facts for supervisors (b) prepares credit slip
Maintains consumable supplies for department
Fills requests for office supplies in lib. by selecting supplies from shelves & loading supplies on carts
Approves & checks purchase orders received against original order submitted

Personnel and Payroll

Checks applications for employment for correctness and completeness
Conducts typing tests of clerical applicants & forwards results
Maintains & provides Director with a monthly report of personnel expenditures
Files time-off requests, sick leave reports, & other reports explaining variations from standard work week
Sends quarterly reports to employees indicating amount of compensatory time, debit time, etc. coming to them
Prepares W-2 statements for staff
Computes time owed worker or time worker owes lib. from time-off reports & notifies supervisor
Checks hourly time cards of staff & corrects & rectifies discrepancies
Files payroll records of staff in lib.
Prepares payroll for lib. personnel
Files work records of staff in personnel files
Maintains personnel files on all employees & former employees in public lib.
Prepares quarterly tax statements from payroll records & submits to appropriate government agency
Keeps time & leave data for staff by maintaining daily entries of hours worked, leave status, etc.
Explains to new employees, employee programs such as credit unions, etc.

Fiscal

Prepares deposit slips for cash received weekly from branch libs.
Writes all checks for lib.
Operates checkwriting machine
Enters weekly fiscal transactions for lib. in appropriate ledgers
Reconciles lib. bank accounts
Maintains check register, bookkeeping system, etc. for PL
Sends verified accounts payable to Director for approval & answers questions or provides explanations when requested
Maintains chronological account of expenditures for equip., materials, & furnishings
Checks bills against original purchase order upon receipt & requests staff approval for payment
Prepares for Board review & eventual approval (or disapproval) all bills due & accumulated for past month
Supervises petty cash fund for public lib.
Deposits all income for lib. in appropriate accounts
Maintains liaison with city clerk & treasurer's offices regarding payments to lib.
Prepares for Lib. Board, monthly financial report of activities including line item accounting for past month
Compares dealer's statements claiming nonreceipt of payment against lib. records to determine if invoice has been paid &/or requests evidence of payment from branch or system lib. & budget office
Provides quarterly encumberance reports to dept. within public lib.
Controls keys to check-writing machine

FA 2 - Selection and Acquisition

Opens new titles received & checks for damage
Inserts order card & signed form in envelope & lays aside for posting
Files for later consideration order requests for unpublished titles
Stamps accession number in new titles
Enters accession number of new titles in accession book
Writes order form by copying publication date, budget account number, and date ordered
Sends to cataloging dept. & reader services dept. copies of typed book order forms
Retrieves from files original order forms when jobber's invoice arrives
Matches with original order slip newly arrived books & materials
Types form letters for claiming undelivered magazines
Types form letters & envelopes to accompany order cards to jobbers & publishers
Files copies of completed order forms
Types form letters to jobbers requesting explanation of overdue book orders
Photocopies title page of titles for which order slip has been received & data is not contained in microform index
Checks order files to ascertain whether new title requested on order slip is on order
Trims photocopy of title page to order slip size & staples to
Records all rental orders & amounts by order number in order book as instructed
Maintains list by author & title of titles purchased by system
Types upon instruction from supervisor purchase order for purchase of titles under examination plan
Sets dial on automatic stamping machine for purchase order number, current date & vendor code number & stamps each order
Checks new titles & accompanying cards, initials control card & routes to processing
Reviews files to determine if serials &/or continuations are on order
Maintains file of comments of journals reviewed, examined, and rejected
Records on book order form account codes to which ordered items are to be charged
Maintains address files of publishers, jobbers, & suppliers of materials
Checks stacks to identify missing serials or continuations & prepares order card acccordingly
Maintains list of titles purchased by acquisition unit & provides monthly report of total orders
Converts foreign currencies to U.S. dollars on purchase order forms & routes invoices to checkwriter for payment
Checks foreign invoice against dollar conversion tables to verify vendor's bill
Selects form letter to be sent to jobber upon receipt of incorrect order
Reviews order forms from pat. & checks to see if title is on order, if title has been purchased & is on file, & whether information supplied on order form is complete
Sends upon instruction, rejected titles to jobber &/or publisher with completed form letter summarizing information on rejected titles

(FA 2 - Selection and Acquisition, cont'd)

Prepares book order form for mailing; if order must be prepaid, sends to billing for payment
Notifies supervisor when expected subscriptions do not arrive on time
Types purchase orders for titles to be purchased & sends to jobber
Records on charge sheets, checks received from member lib. for titles purchased through lib. system, & sends check to accounting dept.
Maintains payment card for all subscriptions
Examines jobber's invoices & writes price for new titles on original order slip
Maintains history card for periodicals & continuations
Checks all order slips for accuracy
Sends to branches list of journals for which subscriptions are about to expire & solicits recommendations for renewal or termination
Maintains current card file of magazine & newspaper subscriptions & logs issues as received
Computes discount price on order forms for member lib. upon receipt of orders in processing cent.
Checks against original order form & approves for mailing, all materials to be sent to system members
Separates book order requests received from member lib. in processing cent. according to nature of order
Examines for completeness & accuracy completed book order forms received from members in library system
Assigns accession numbers to all new print materials
Processes art prints & films by assigning accession numbers
Checks order files & catalog files to determine if ordered title is a reorder and if so, notes on order form
Computes rental rates on order forms for rented equip. & materials
Maintains shelf list of titles purchased by system members in lib. system
Maintains file of missing issues of journals & periodicals
Opens new AV materials received & checks against original purchase order
Checks new AV equip. against purchase order to insure correct delivery

FA 3 - Cataloging and Processing

General Processing

Arranges in alphabetical order and sets aside for later examination all titles for which LC cards & classification information are not available
Shelves new books alphabetically by first letter only
Writes date code in all new titles
Places master catalog cards on templates for reproduction in processing center
Removes master catalog cards from template and routes for refiling in processing cent. master catalog file
Opens & collates new titles according to accepted practices
Accepts from Acquisition Dept., new titles & serializes (a) titles using stamping machine & (b) one copy of book order form

(FA 3 - Cataloging and Processing, cont'd)
(General Processing)

Sorts & files book order slips after serialization is completed
Places identifying symbols, numbers, stamps, & marks on new books
Writes classification number & other information on designated page of new title
Files, following completion of cataloging, original LC cards & paper tapes
Copies, by writing, new book cards, pockets, etc.
Alphabetizes by title, boxes of reproduced card sets in processing cent.
Shelves alphabetically duplicate copies of titles received in processing cent.
Organizes master cards in sets according to established order & rubber bands each set in processing cent.
Batches (or sorts) slips corresponding to master card sets in processing cent.
Combines batched slips with master card sets & rubber bands in processing cent.
Arranges rubberbanded master card sets in alphabetical order by title in processing cent.
Types pockets, cards, etc., from previously supplied information
Types shelf list card for non-fiction titles
Writes call number on title page of new titles
Sets fiction titles aside to be held for receipt of LC proof slip if no proof slip is in date files
Corrects or reruns card sets upon notification of problem cards from batching
Types information for new fiction titles on book pocket
Cuts reproduced catalog cards, sorts by type of card & routes to batching
Records number of processed books to be mailed to each lib. or system from processing cent.
Checks LC proof slip date files for new non-fiction titles
Checks LC proof slip date files for new fiction titles
Operates & maintains card-master machine
Types cards for catalog upon receipt of book processing form which describes steps
Checks titles on storage shelf against each order of LC cards received
Produces number of catalog cards required by using multilith machine or photocopy equip.
Locates master file catalog sets upon notification of errors in card sets & gives to reproduction for correction in processing cent.
Types on book slip, descriptive information from title page of fiction titles
Operates Flexowriter machine to produce catalog cards from tapes
Completes billing for titles in processing cent. by adding processing costs & transmitting invoice to bookkeeping unit
Checks cards received from central catalog service against card catalog & notifies supervisor if title is in system
Compares LC proof slip with title page of non-fiction title & types descriptive cataloging information on book slip
Checks for accuracy typed catalog cards
Arranges into sets new master cards received from processing cent. reproduction dept.; removes one set for master file; rubberbands remaining sets and places in boxes

(FA 3 - Cataloging and Processing, cont'd)

(General Processing)

Separates by type, computer processed perforated catalog cards
Identifies fields & types code numbers for keypunching on book slip accompanying non-fiction titles
Examines data for reproduction of catalog cards & determines (a) whether to multilith cards or (b) photocopy cards
Checks label & cards on new titles received from cataloging dept., inserts circulation card, & places on new book desk

Newspaper Processing

Clips marked newspaper articles, magazine articles, etc.
Stamps date & title of newspaper on articles clipped from newspapers
Prepares newspaper clippings by glueing and stapling on blank pages for files

Physical Preparation

Sands (with sandpaper) cartons (microfilm boxes, tape boxes) before glueing on identification labels
Types identification material & places on new nonprint materials as instructed
Hand letters non-print titles & materials with identification marks
Letters call number on non-print materials using indelible ink pens
Prepares paperbacks for circulation by reinforcing spine with mylar and placing pressure sensitive tape on cover
Checks cataloged new titles to make sure book pockets have been inserted, book cards are included, spine labeling has been completed, etc.
Types linen strip labels to be placed on waterproof book coverings
Shellacs over spine labels on new books
Inserts pamphlets in binders for storage
Types paper labels for non-waterproof book coverings
Types spine labels for new books copying from written forms
Places spine label on book in designated place
Inserts magazines, journals, etc. in plastic covers
Uses scissors, ruler, tape & other simple tools to place plastic covers on new titles
Sorts books by type of covering required -- waterproof, plastic-coated, or regular
Glues pockets in new books & inserts typed book card in book pocket for each new title
Examines book to determine type of spine-label required
Processes new filmstrips & tapes by attaching trailers & leaders
Types ownership labels for AV materials
Affixes ownership labels to AV materials

FA 4 - Registration and Circulation

Registration

Registers new applicants for lib. card by (a) obtaining address
(b) checking to determine if applicant had a card previously
(c) assisting applicant to complete application
Records change of address, etc., to amend master records as requested by pat.
Types new patron's name and other identifying information on cards
Inspects (by reading) all new application cards for complete & accurate information
Completes information on pat. application forms by contacting applicant for information as instructed by supervisor
Reviews completed applications for lib. cards & determines whether to issue card on the basis of information on the application forms

Circulation

Serves on circulation desk & stamps date due slips in books
Processes renewal requests by (a) checking to see if title is on reserve (b) checking date due to determine whether pat. has exceeded allowed time & if not, stamps new date due on book card
Files circulation cards by call number
Checks pat. lib. card against fine file before checking out titles or materials to determine if fine is due
Estimates number of date due cards needed for next day
Stamps date-due cards for next day
Takes daily circulation count of books and AV materials
Sets up daily date due machine
Checks circulation desk area daily to be certain book cards are cleared out of circulation area at close of business
Operates checkout machine at circulation desk
Examines for damage titles returned to lib.
Types upon request by pat. list of all materials checked out to pat. and posts
Operates input terminal on circulation desk by inserting pat. badge and book card; upon receipt of both from terminal, examines printout for irregularities & finding none, inserts book card in pocket & returns badge
Operates input terminal on checkout desk by inserting card from returned titles & upon receipt of printout either places book on cart for shelving or on reserve desk
Processes circulation card by (a) stamping with pat. information
(b) punching circulation card & book card with pat. data for later machine tabulation
Searches for correct book card of title presented by pat. for checkout in which incorrect book card has been placed previously
Changes cartridge in input terminal to accommodate length of time book can be checked out
Notifies cataloging dept. of lost titles by completing simple form instructing cataloging to remove titles from files
Examines book card & pocket information to be sure both match before checking out books to patrons

FA 4 - Registration and Circulation, cont'd)

(Circulation)

Locates book card by due date for returned titles, checks card against book pocket information, and places card in book pocket
Maintains daily, weekly, & monthly statistical records of activities & requests in Circulation dept.
Removes date due card from books received from pat., determines whether or not book is overdue
Notifies pat. of arrival of requested new titles
Explains as requested circulation rules & regulations in lib.
Corrects errors on daily "printout error listing" for Circulation dept. by checking printout against original records
Consults mailing charts to determine postage & insurance charges for AV materials sent via mail & records amounts on forms for Shipping dept.
Logs in returned AV materials (films, art prints, records, etc.) & sends to examination clerk
Checks out AV materials to pat.
Fills requests for AV materials "over the desk."
Types multicopy form to instruct Shipping to mail AV materials to pats. requesting the materials

Overdues/Fines

Records fine data on Rolodex file by card number
Operates electric cash register
Computes fines using standard fine chart
Files book cards of titles overdue more than one week, in bookmobile fine file
Computes fine on overdue books, completes fine form, and routes to billing
Locates pat. registration card and clips form for each fine form to card
Computes accumulated fines clipped to pat. registration card and if over stated amount, withdraws card and routes to billing
Sends form letter to patrons with overdue bills
Provides information to supervisor to enable supervisor to make personal telephone calls to patrons with overdue titles
Fills out receipt for pat. upon payment of fine,attaches second copy to paid bill, and routes to billing
Records on copy of patron's bill receipt of payment for damaged, lost, or destroyed titles & forwards money for deposit
Verifies printouts of overdue titles & follows up
Completes & mails postcards notifying pat. of titles overdue from bookmobile
Writes letters over signature of supervisor to go to patrons with overdue titles
Telephones patrons with overdue titles
Computes monthly report of fine income by using adding machine (or hand count) from monthly cumulative list
Discusses with patrons issues regarding charges against patrons for overdue titles

Shelving

Sorts titles on book cart according to location areas & arranges numerically or alphabetically by information on book spine
Shelves fiction material alphabetically by author's last name
Shelves special collection according to broad subject labels on spine
Shelves one-week titles in appropriate section without regard to order
Checks stacks in search of overdue titles
Sorts titles returned to circulation desk by division, subject, etc., and sets aside for later shelving
Moves titles to circulation desk from stacks & from circulation desk to stacks using book cart
Shelves non-fiction books according to Dewey Decimal system
Searches stacks for titles upon receipt of call slips
Searches stacks for titles requested in interlib. loan
Files AV materials returned by pat.
Files microfilm & other materials alphabetically by title

Reserves

Checks to determine if title requested by pat. on reserve order form is (a) in circulation (b) in stacks (c) elsewhere
Notifies pat. of availability of book on reserve by (a) telephoning (b) mailing notice
Locates reserve book upon presentation by pat. of postcard received from lib.
Locates book card for book already in circulation and attaches reserve order form completed by patron
Marks with identification symbol book cards for titles in circulation for which a reserve order has been received
Identifies returned titles for which reserve order has been made by noting identification symbol on book card & sets book aside for reserve
Examines for completeness, reserve form presented by pat. & quizzes pat. for information not provided
Inserts reserve slip in book & files alphabetically by name of patron requesting book
Checks reserve order files & removes AV materials from reserve shelf

Interlibrary Loan

Answers telephone for interlib. services & requests data necessary to process interlib. loans
Checks files for institutional pat. information requesting title through interlib. loan & sets titles aside for pickup
Packages for return, films received from interlib. loan
Transmits on proper form to interlib. loan unit all approved requests for interlib. loan
Separates & staples received TWX messages for interlib. loan materials & services

(FA 4 - Registration and Circulation, cont'd)

(Interlibrary Loan)

Searches lib. files for interlib. loan requests & finding title in system, completes call slip for titles

Marks on desk calendar date titles are due from interlib. loan

Notifies pats. by form letter or TWX of availability in time of article requested through interlibrary loan

Assigns borrower's number to all new requests for interlib. loan materials

Examines calendar noting date due for interlib. loan materials & telephones or sends form letter to pat. requesting return of materials

Computes postage & insurance rates (using standard tables) required for all materials to be sent out via interlib. loan

Telephones or notifies pat. via postal card when title requested through interlib. loan has arrived

Writes order forms for search information for titles requested through interlib. loan

Maintains files of all books requested through interlib. loan

Arranges all request forms in alphabetical order by author prior to search for titles

Determines by checking card catalog if material requested through interlib. loan is available

Files by date of availability, interlib. loan requests for films, art materials, etc.

Types cards with identifying information such as name of lib., title, author, call number, pat. name, date due, etc., for interlib. loan title received from another lib.

Files typed cards for interlib. loan materials in interlib. loan file

Processes interlib. loan application for titles requested to be placed on reserve & not in lib. or on order

Searches files to determine availability of AV materials & equip. requested through interlib. loan

FA 5 - Reference Services

Directs pat. when questioned to specific subject area locations in the lib.

FA 6 - Patron Services

Receives lost articles & checks identification for claim of articles

Completes photocopy request form for reproduction of materials

Retrieves materials in stacks upon request for microfilming

Checks with supervisor regarding specific photocopy limits for system members

Produces photocopies of materials upon request & under specific instruction

Inserts microfilm negative in microfilm machine to display negatives as requested

FA 7 - Collection Maintenance

Rewinds & inspects film
Files materials in vertical files using standard tools
Marks shelves in main lib. & reference areas with classification numbers for easy location by pat. & shelving clerks
Removes from special display table each new journal after brief display & places in proper sequence on shelf with regular back issues
Updates bindery control file
Examines card catalog & replaces soiled & damaged cards
Inventories shelves & checks against circulation records & shelf lists to determine if titles are still in system
Reinforces pamphlets, booklets, etc.
Sorts bound journals received from bindery by branch lib.
Examines for damage books returned to bookmobile & sets aside books requiring maintenance
Inspects record discs returned by patrons by removing from jacket and examining for breaks, scratches, etc.
Performs simple mending operations (taping, glueing, etc.) on materials in mobile unit
Changes soiled plastic book covers on books as instructed
Participates in "shelf reading" by examining shelves to determine if titles are properly placed & carded
Repairs torn pages in damaged books
Cleans record discs returned by patrons by wiping gently with a damp cloth
Inspects for erasures, etc. by playing recording tapes returned by pat.
Prepares purchase orders for titles to be sent to bindery
Splices tapes, filmstrips, etc. using simple tools such as scissors, transparent tape, etc.
Mends broken tape boxes, record albums, etc.
Checks inventory of AV materials & identifies materials requiring repairs
Operates film cleaning machine
Dates & stamps new issues of journals received from Acquisition dept. & places on a special shelf
Maintains chronological lists of expenditures for AV equipment & materials in AV unit
Inspects materials in patron's possession (lib. books, textbooks & briefcases) at checkout points
Inspects new fiction shelf & removes titles on shelf more than six months

FA 8 - Facility Maintenance

Performs general housekeeping in reading area at end of each day
Maintains inventory of AV equip. in dept.
Types maintenance purchase order

SUPERVISORY CLERICAL

Approves (by initialing) weekly time cards for classified staff employees
Supervises duplications, photocopying, etc., produced by copying dept.
Plans weekly work schedules for part-time clerical staff
Assigns new clerical employees to in-service training & determines when sufficient exposure has been acquired to system
Authorizes the mailing of overdue notices to patrons
Supervises form letter process to pat. with overdue titles
Assigns interlib. loan requests to staff members & follows up by periodic checking
Approves or disapproves office & supply purchase orders
Coordinates tours to lib. by scheduling & assigning guides from staff
Evaluates work requests from branches & when appropriate, assigns clerical staff on basis of estimates of needs
Trains new clerks in specific tasks in system headquarters book service dept.
Authorizes final notice form letters to be mailed to patrons with overdue titles
Supervises activities at circulation desk & shifts staff depending on pat. traffic & needs
Supervises clerks in stacks & determines work assignments based on work flow
Supervises lib. payroll clerks
Approves totals produced by clerks on weekly cash reports received from branch libs.
Supervises special mailings, such as notice of Library Week activities
Sorts all mail, telephone, & TWX requests for interlib. loan & assigns to appropriate staff
Examines and verifies all fine charges in excess of specified amount
Schedules & determines clerical staff assigned to branches taking into account workload, personalities, branch reports, & data from personal site visits

LIBRARY TECHNICAL ASSISTANT

FA 2 - Selection and Acquisition

Checks standard tools for author information, publication data, & price to prepare purchase order for new titles
Determines verification sources to be used in checking completed book order form & instructs clerk
Writes for typist information for books, materials, & other requests to be ordered on purchase order form
Transcribes author & publication data to request forms from standard tools summarizing & reviewing new titles
Checks standard tools against list of damaged titles to determine if titles are still available for purchase
Checks general catalog for new book orders received & if in collection, records call number on order form
Examines for completeness & accuracy order forms for periodicals received from members in lib. system

(Library Technical Assistant, cont'd)

(FA 2 - Selection and Acquisition)

Searches card catalogs & order files to ascertain if titles received under examination plan are in collection or on order

Searches standard tools to locate titles for which order slip without LC number has been received & card is not contained in microform index

Compares catalogs against standard collection-building tools and notes titles not in collection

Examines requests for serial back issues & replacements & orders materials following specific guidelines

Completes order card consisting of author, publisher, & other data for titles to be included in consideration file

Produces annually list of serial & journal subscriptions held by lib.

Answers questions & adjusts complaints from branch librarians & patrons regarding non-delivery &/or delivery time of journals by checking master file of subscriptions

Verifies new titles received & instructs clerk to destroy original order slip

Prepares letter to jobber describing nature of incorrect order & action lib. wishes to take

Selects & revises (if necessary) form letter to jobber or publisher

Tabulates on machine by totaling (for each budget area) estimated expenditures for new titles for month past

Submits to supervisor book order forms involving unusual cost, vague & incomplete information, rush requests, etc.

Maintains charge sheet (list of titles by price & dept.) for orders

Writes ownership data & replacement costs for typed label for new films, tapes, etc. in AV department

FA 3 - Cataloging and Processing

Checks standard tools for cataloging information for titles on which no LC card is available

Checks card catalog for new fiction & non-fiction titles & other materials to determine if titles are in catalog

Checks catalog, new shelf list, &/or order file for form of author's name & types on book slip accompanying non-fiction titles

Underlines author on title page using LC cards as a guide & notes discrepancies

Revises printed cards received with new titles to accommodate lib. classification system procedures

Prepares cards for new titles by searching for descriptive information in catalog file

Checks catalog card against Cutter catalog & assigns Cutter number

Verifies by research, identity of new author when author card is not in catalog & types author card according to format noting reference sources used in verification

Compares prepared catalog cards received with new copies of titles, serials, or volumes against card catalog

Files new master shelf list cards in master shelf list file

(FA 3 - Cataloging and Processing, cont'd)

Telephones for biographical data on authors not established in official card catalog
Checks catalog & shelf list for form of author's name for new fiction titles, & types author card
Checks books in processing cent. before packaging & shipping to determine (a) if order is correct (b) if books are properly processed
Searches lib. tools for classification data for titles not available in processing cent. catalog & copies appropriate information
Compares manuscript card with title page of new title & amends or adds to card according to prescribed instructions
Determines through research, personal knowledge, or observation if author is writing under penname, types author card using penname and cross references penname with real name, if known
Checks shelf list for data for producing preliminary classification cards
Writes form letters for biographical data to authors not established in official card catalog
Checks for LC number on titles not in master file in microforms index & pulls card
Goes to another lib. to obtain cataloging information on orders for which no information is available in the processing center
Finds new titles listed in the union catalog & provides information for typist to type duplicate cards
Encloses title of new titles with slash marks
Places microform card on micro-reader & records appropriate cataloging data
Edits all information on LC card & gives to Flexowriter operator who cuts tapes for cards
Prepares for typist, data to be typed on subject, author, & other cards
Notes changes in title of a serial or periodical & changes records in classification system beginning with effective issue
Answers processing questions received from system lib. members & refers policy or procedural questions
Orders supplies needed for Cataloging dept. based on inventories and estimated work load

FA 4 - Registration and Circulation

Checks overdue list & determines whether to send list to Finance offices for collection
Drives to address shown on overdue notice to borrower & attempts to obtain overdue materials, fine, or lib. card
Schedules return appointment to obtain overdue materials not on pat. premises &/or advises pat. of alternative methods for returning overdue materials
Determines amount to charge pat. for lost title by (a) consulting tools (b) determining age, approximate condition & replacement costs

(FA 4 - Registration and Circulation, cont'd)

Responds to complaints for non-delivery of reserve books by checking for reasons & relaying same to pat.

Attempts to trace & locate pat. with overdue books who have left area by calling employers or by deciding whether long distance calls are justified, etc. & follows up accordingly

Makes decision on reduction of fines or cancellation of charges when pat. question or complain about billing either in person, by telephone, or by letter

Reviews fine records after fourth notice has been sent & decides
(a) whether to call pat. on telephone & request book be returned or
(b) dispatch messenger to pick up book at pat. home

Resolves overdue materials problems such as pat. being charged for titles in stacks

FA 5 - Reference Services

Prepares upon request list of works by one author

FA 6 - Patron Services

Determines upon receipt of order for periodical or article
(a) periodical be sent to pat. via system member
(b) request be made to resource center
(c) order form is incomplete
(d) order form be returned for additional information

Writes for copyright clearance for reproduction of copyrighted publications upon request from supervisor or outside community groups

FA 7 - Collection Maintenance

Coordinates space & time schedules for moving weeded books from branch libs. to central lib.

Reviews shelves & selects titles in deteriorated condition, of excessive age, & for lack of use, & sets aside

Checks for indexing, spine labeling, card pockets, & color, bound volumes of journals received from bindery and shelves

Stamps titles withdrawn from circulation & pulls & destroys catalog cards

Identifies titles unsuitable for binding or not in print & schedules for future microfilming

Sends to bindery with instructions, selected journals & magazines to be bound into annual volumes

Gathers & collates monographic materials for binding & prepares instruction form for each group of materials

Notes gaps in journal & periodical collections & recommends to supervisor whether lib. should purchase back issues or microfilm copies

Checks shelf list against stacks to make sure they correspond

Determines title under search is lost & starts process of notifying Catalog dept. to remove cards from catalog

Checks charge records, charts, & other files to trace missing materials after routine checking has been unsuccessful

Arranges for disposal of surplus books & materials to local lib. or by way of surplus book sales

TECHNICAL ASSISTANT

Audio Visual

Schedules jobbers to display & demonstrate AV equipment for staff evaluation
Lists AV equipment to be examined for purchase
Reviews journals, brochures, & other publications to screen AV equip. & produce lists of equip. for possible review
Approves scheduling test demonstration of AV equip. & materials
Schedules, reviews, & test competing AV equip. & recommends to supervisor
Examines & test operates new AV equip. to insure proper functioning
Checks AV machines & sets aside malfunctioning equip.
Notifies serviceman of problems with AV equip. & authorizes repairs
Describes malfunctioning AV equip. & transmits information for typing
Evaluates damaged AV materials & decides (a) local maintenance possible (b) outside maintenance required (c) materials be traded in (d) materials be discarded
Evaluates malfunctioning AV equip. & decides (a) local maintenance is possible (b) outside maintenance required (c) equip. should be traded (d) equip. should be discarded
Examines & troubleshoots AV equip. in response to requests from users
Performs first echelon maintenance on wide array of AV equip.

Data Processing

Codes returned questionnaires for data processing
Checks data on print-out sheets for accuracy upon completion of each program execution
Transmits punched tape materials to computer via telephone module
Operates auxiliary electronic data processing equipment (i.e., sorters, collators, decollators, bursters, & slitters)
Operates Sanders 720 reader printer terminal to retrieve reference information from files
Types input data for computer using "on-line" keyboard device
Arranges by telephone & teletype machine for clearance to use computer

Microfilming

Operates camera-tape microfilm machine by setting for height, exposure meter, inserting materials to be microfilmed & operating camera
Examines for defects microfilmed materials returned from processor by scanning material in microfilm reader
Operates microfilm machine to produce microfilmed materials, newspapers, reports, etc.
Checks developed microfilm for acceptability & refilms if necessary

Printing

Supervises staff in lib. print shop
Produces monthly report summarizing activities of print shop
Performs minor maintenance on print shop machines such as mimeograph machine, multilith machine, typesetting machine, etc.
Monitors & maintains paper & reproduction supplies for lib. print shop
Determines method of reproduction (photocopy, multilith, etc.) for materials to be reproduced

Photography

Produces negatives from black & white films
Takes for publication photographs, using standard cameras, for release to press or for use in lib. newsletters
Operates developer machine to produce photographs from exposed film
Operates cameras including still, 35 mm., 16 mm., etc.

Other

Writes manuals & instructions for operating Flexowriter machines and keypunch machines
Performs minor maintenance on art prints by touching up frames and cleaning prints

LIBRARY ASSOCIATE

Serves on information desk of lib. & guides pats. to depts. & other locations where required services can be provided
Serves on information desk & answers questions regarding assistance & lib. services
Serves on information desk & answers simple reference questions from pats.
Assigns subject headings to pamphlets & materials for pamphlet files using standard lib. tools & lib. system
Reduces to writing description of ordering process including descriptions, steps, & symbols used
Scans community & metropolitan newspapers for articles & information of interest to local community & clips for filing
Translates titles or materials from foreign languages into English
Translates from foreign languages, information necessary to complete descriptive cataloging of title
Conducts story hour for pre-school children by reading books &/or telling stories & illustrating same with felt images on flannel board, etc.
Constructs felt images of animals, cartoon characters, etc. and other objects for use on flannel board*
Makes puppets & other simple toys out of paper sacks & inexpensive materials as giveaway gifts for pre-school children's prizes at story hour*
Serves as youth/ethnic group leader in slum located branch & works with youth to interest them in lib. activities

*Only in the context of other related tasks. Might well be, "Assists children to..."

ASSOCIATE SPECIALIST

Selects theme, display materials, & overall design for display based on seasonal or topical events for lib.
Develops forms & procedures for operating film rental service
Serves as liaison between editors and printers
Writes rough reports & gathers materials for public relations specialists to produce releases, publicity, etc. regarding lib. programs
Designs placards, handbills, etc. for display in lib.
Proofreads proofs returned from printer prior to publication of bulletins
Schedules use of meeting rooms, makes equip. available, provides overall arrangements, etc.
Maintains weekly calendar of events for display in lib. & for publication
Maintains newspaper clipping file of lib. publicity
Maintains & updates scrap book on weekly column in newspapers, feature stories on lib. in newspapers, press releases, & materials referring directly or indirectly to lib.
Draws floor plans of lib. to be posted on each floor to direct pat.
Provides rough sketches for book marks, brochure covers, etc.
Provides rough sketches for memorial plaques
Edits copy for professional bulletins describing lib. activities, etc.
Reduces statistical data to tabular form
Designs community oriented special displays in branch lib.

ASSOCIATE SPECIALIST or SPECIALIST

Collects & maintains file of salary schedules in other lib. to incorporate in annual budget submission
Interviews job applicants for public lib.
Checks by telephone or personal letter, references submitted by job applicants
Conducts exit interviews with employees terminating from lib.
Writes letters of response to applicants for positions in lib.
Revises staff manual according to suggestions of executive committee during review process
Writes publicity copy for lib. & submits to local newspapers
Writes "spot" announcements on lib. services for local radio station
Writes weekly column for local newspaper containing special interest information on PL
Writes press releases for local newspaper describing PL activities
Designs page layouts of bulletins for printer
Assists newspaper staff in writing stories & gathering data
Gathers from community sources, cultural events planned for the coming month
Writes monthly newsletter of cultural events occurring in the community
Writes for distribution to pat., materials explaining collection, use, policies, etc. of adult PL

LIBRARIAN

FA 1 - Administration

Designs & develops reader interest surveys in lib.
Conducts reader interest surveys in lib.
Contacts community groups, agencies, etc. likely to benefit from mobile service & explains mobile possibilities
Maintains liaison with HS librarians to determine closed reserve shelf needs in local PL
Meets periodically with sch. librarian to develop joint children-oriented programs in use of PL
Selects groups within the community or larger area to receive donated titles
Screens solicitors, special requests, etc. in branch lib. & refers to main lib. when necessary
Conducts tours & technical discussions of lib. facilities, procedures, & policies for visiting professionals
Participates in community or service organizations, etc. as representative from public lib.
Develops relations with local community organizations to stimulate support & interest in branch lib.
Writes weekly book review column for local newspapers
Writes for publication & distributes bibliographies on special collections
Adjusts or refers complaints regarding services, selections, and other factors in adult lib.
Accepts or rejects requests from groups (offering educational & other programs) for shelf space to circulate titles to be used in programs

FA 2 - Selection and Acquisition

Negotiates with vendors & jobbers over acquisition of rare & out of print materials
Evaluates written order slips to determine appropriateness of order
Selects new fiction titles to be included in rental collection
Maintains want list for out of print titles & bids on, makes proposals, etc. when titles become available
Selects reference tools for lib.
Telephones publishers, jobbers, etc. for orders of unusual expense, rush, etc.
Reviews standard tools to select new titles for lib. system members
Selects books & other materials to be purchased by memorial fund
Prepares reports for memorial fund book donors
Selects titles to be placed at circulation desk monthly from new acquisitions
Selects newspapers to be clipped to maintain lib. clipping files
Reads trade publications, book reviews, etc., reporting on titles & media for ES children & selects titles for purchase by PL
Anticipates long-range needs of reference service & accumulates materials accordingly
Evaluates usage patterns of films on lease or rental & decides whether to continue or discontinue renting or leasing arrangements or to purchase films

(Librarian, cont'd)

(FA 2 - Selection and Acquisition)

Relays to clerk periodical order form with instructions to verify in (a) system catalog (b) headquarters catalog (c) other sources
Approves & signs letters of transmittal to jobbers & publishers for orders of books & AV materials
Assigns book orders to jobbers by determining the most advantageous process for each order in processing cent.
Examines titles received under examination copy plan & determines dept. within lib. to receive title for eval. & possible purchase
Reviews lists of serials &/or continuation & makes decision regarding recommendations to subscribe
Reviews professional literature, etc. & selects 16 mm. films for public lib.
Evaluates requests for titles not in lib. & not available on inter-library loan to determine whether or not to purchase
Consults with colleagues over special foreign language &/or subject matter peculiarities on book order forms
Evaluates suggestions from staff regarding journals & magazines to be retained in permanent collection
Examines titles rejected by dept. librarian & decides to (a) approve purchase (b) confirm rejection, or (c) recommend to branches & other staff for consideration
Reviews standard lists of serials & continuations & produces recommended lists for purchase & description
Reviews & selects materials for possible inclusion in branch lib. collections
Decides what titles to purchase for collection from list of titles in standard collection building tools
Conducts gross screening of professional publications, prepares list of possible acquisitions, & sends to branches for comment
Selects jobber or publisher to receive book orders
Receives gift offers for lib. & with technical assistance from staff decides to accept or reject offer
Evaluates requests on basis of long-range needs of adult PL to purchase multiple copies of titles to supplement HS courses
Evaluates staff recommendations and takes action for purchase, rental, or long-range lease of films, microfilms, etc.
Evaluates staff recommendations regarding disposition of gifts
Authorizes & approves purchases of variety of AV materials including art prints, film loops, kits, maps, microfiche specimens, etc.
Reviews consideration file of AV materials & recommends to supervisor purchase of selected materials
Determines purchase policies on films by (a) rejecting purchase of specific film (b) purchasing film (c) renting film for specified periods (d) leasing film

FA 3 - Cataloging and Processing

Catalogs new non-fiction titles using LC MARC tapes as source & adapting to lib. system
Determines number of entry cards required for new titles
Determines number & kind of cross reference cards needed for new titles

(Librarian, cont'd)

(FA 3 - Cataloging and Processing)

Decides to hold or perform original cataloging for new non-fiction titles for which LC proof slip is not available
Examines non-fiction titles to determine general subject matter, specific uses of material, &/or special interest material
Rearranges material in vertical files to accommodate changing political, social, etc., scene
Determines cross reference subject headings for new serials & writes title & cross reference data for key punch operator
Trains colleagues in procedures for completing descriptive cataloging of foreign language titles
Determines subject classification of non-fiction titles by consulting standard tools & types on book slip
Determines & selects filing system for reference service in lib.
Supervises filing of materials in reference lib.
Writes manual explaining processing procedures & policies for lib.
Classifies non-fiction titles using the Dewey decimal system
Organizes by priority new titles received for cataloging before proceeding with review
Evaluates classification procedures & recommends changes
Maintains & updates authority files
Assigns call numbers to new titles using LC system
Assigns Dewey decimal system call numbers to non-fiction title making sure number meets computer programming requirements
Annotates filmstrips, loops, transparencies, etc.
Answers questions via telephone, personal visits, & letters regarding cataloging & selection for member lib. in system

FA 4 - Registration and Circulation

Designs form letters to go to parents of children with overdue books
Writes letters responding to inquiries or complaints regarding services or activities of Circulation dept.
Approves or disapproves requests for interlib. loan based on need, complexity, borrower, & other factors
Approves interlib. loan orders for materials to leave unit
Evaluates & revises circulation system for AV equip. & materials
Identifies statistical data to be tabulated & filed in Circulation dept.
Writes reports summarizing activities in Circulation dept.
Coordinates interlibrary loan of filmstrips & other AV materials with neighboring institutions
Establishes order of priority for interlib. search for titles not available and instructs clerk

FA 5 - Reference Services

Maintains & updates card file of frequent hard-to-locate questions with source of information & answers for use in provision of reference services in adult lib.
Prepares specific reference reports by searching files & assembling materials as requested
Responds on telephone for reference services & decides, based on own judgment of degree of difficulty, whether to (a) have pat. hold (b) return the telephone call with the answer
Provides reference services to adults in PL

FA 6 - Patron Services

Selects upon request book lists for adult, children, & other groups
Produces as requested special indices
Writes for distribution to pat. materials explaining collection, use, policies, etc. of children's lib.
Shows film to slum youth in lib. & answers questions during showing
Conducts group discussions with slum youth about films, books, etc.
Evaluates subject requests from lib. system member & instructs either in writing or verbally to process request
Scans & examines briefly new titles purchased by adult lib. to maintain knowledge of lib. holdings
Reviews all new films before public showing
Prepares special book lists from original sources for committee meetings upon request
Answers all queries & requests for services in branch lib. & refers when necessary to main lib.
Counsels children during school visits in mobile unit on reading habits & attempts to motivate reading
Maintains secured shelf list of rare, expensive, &/or controversial titles & circulates after assessment of patrons
Conducts special programs for special groups in lib. (aged, scientists, minority groups, etc.)
Screens (for appropriateness & suitability) titles children wish to check out in adult lib.
Lectures as requested on special collections in lib., rare book, &/or general lib. holdings
Supports & encourages lib. use by children by developing programs of special interest
Provides suggestions to community organization on subject area or titles for group discussion
Conducts summer reading clubs & programs for elementary sch. children in PL
Designs & develops summer reading clubs & programs for elementary sch. children in PL
Moves about lib. to make self (as head librarian) available to patrons
Conducts group programs for young adults in lib. meeting room
Plans & develops young adult activities in lib.
Assists adults in use of catalog system in PL
Develops one-time programs of reading motivation involving reference search, reading eval., etc.
Discusses with parents reading problems of children & recommends reading programs
Evaluates (by addition or deletion) reading lists provided by elementary school teachers

FA 7 - Collection Maintenance

Evaluates recommendations from staff for discarding obsolescent titles & takes action
Examines annually inventory of AV materials to identify outdated materials, &/or those receiving little use, & recommends whether materials should be left in inventory

(Librarian, cont'd)

(FA 7 - Collection Maintenance

Prepares a list of titles to be discarded & submits same to dept. heads for review, criticism, and comments
Surveys titles withdrawn from circulation & determines whether they will be discarded, or depending on their condition, donated to another organization
Evaluates recommendations from staff for binding or discarding titles in adult lib. & takes action
Instructs clerk to send materials & equip. for binding or other maintenance following annual check
Reviews vertical files and removes obsolete & dated material
Approves all discards & permanent withdrawals of materials from lib.
Accepts or rejects recommendations from staff members to microfilm selections from magazines, journals, etc.
Approves or disapproves recommendations from staff to process periodicals by binding, microfilming, or discarding
Directs transfer of titles from one lib. branch, dept., etc. to another

SPECIALIST

General Management

Prepares flow charts, diagrams, & block diagrams to define systems problems of lib. procedures
Approves changes in bookkeeping & accounting procedures
Reads & evaluates technical literature to determine applicability to management procedures in lib.
Determines non-material needs (desks, copy machines, etc.) for PL, evaluates alternative costs & possibilities & recommends action
Evaluates building & grounds maintenance needs for inclusion in annual budget
Approves maintenance agreements on equip. leased & owned by lib.
Provides day-to-day business management of PL
Determines bookkeeping & accounting procedures to recommend to lib. Board
Designs space needs in reading areas keeping in mind present collection and anticipating future needs

Personnel

Assigns new employees to pre-service training settings & monitors training
Updates position classification system & submits for approval
Evaluates statistical & salary data gathered from agencies & recommends salary adjustments for staff in public lib.
Recommends criteria for hiring professional & clerical personnel
Evaluates applicants in terms of references, tests, backgrounds, and interviews, & recommends whether or not applicants should be hired in public lib.

(Specialist, cont'd)
(Personnel)

Interviews professional job applicants for public lib.
Writes staff manual explaining rules, regulations, rights, & responsibilities of employees in PL
Develops regulations concerning staff use of & rights to lib. facilities such as parking, lunchrooms, purchase of books, etc.
Writes employment recruiting advertisements
Designs staff development programs in lib.
Screens roster of current employees for possible placement in job openings in PL
Meets with staff committee to review, evaluate, & redesign library position classification manual
Writes employment brochures describing lib. for recruiting purposes for display on university bulletin boards
Develops job descriptions for professional & clerical staff
Establishes position classification standards for clerical & professional staff in public lib.
Plans goals & develops procedures & priorities for staff in-service training programs
Recommends reclassification of jobs in lib. based on job eval., problems encountered, personal evaluation, etc.
Supervises & evaluates annual employee evaluations conducted by supervisors in PL
Uses other lib. salary schedules & municipal salary schedules to incorporate in budget presentation
Writes advertising copy seeking new staff members, for publication in professional journals
Recruits workers &/or encourages persons to join lib. profession through visits to colleges, universities, etc.
Answers questions from staff regarding personnel problems, procedures, & regulations
Evaluates staff job descriptions for accuracy, completeness, & revises &/or returns to supervisors
Reviews personnel data, reports, etc. from a variety of sources & areas to gain insight into applicability to lib. personnel programs
Confers by telephone & in person with placement & employment agencies regarding personnel needs of lib.
Explains & negotiates with lib. staff, salary proposals for coming year

Public Relations

Maintains contact with mass media representatives
Serves as liaison between family or group & lib. in design & presentation of memorial plaques for lib.
Supervises construction & visual presentation of memorial plaques in lib.
Edits 16 mm. film
Edits publications proposed by staff for submission to media, journals, etc.
Edits manuscripts, materials & other information provided by staff for newsletters

(Specialist, cont'd)

(Public Relations)

Identifies ideas for future stories for newspaper & discusses with newspaper personnel
Approves special requests for issues of monthly publications to be mailed
Develops promotional programs by reviewing ideas suggested by others, reviewing literature, & on own initiative
Selects from mailing lists groups to receive special publications
Approves cover design & artwork for lib. bulletin
Plans & develops staff presentations & discussions of lib. programs on regular radio station
Oversees publication of newsletter announcing & describing lib. activities
Suggests projects and ideas to "friends of library"
Reads, reviews, & scans a variety of professional & general interest materials of public relations value & possibilities for lib. use
Writes narratives for filmstrips, loops, transparencies, etc.

Computer

Writes program for IBM system/360 computer following procedures outlined in the flowchart
Performs desk check of completed computer program
Writes manual or description for each program so that it can be used by another programmer
Tests program on IBM system/360 computer
Classifies completed programs for storage & future use
Supervises programmers in developing simple programs for IBM system/360 computer
Investigates computer applications for processing, circulation, etc.
Reviews programs periodically to refine & reduce operating time
De-bugs program after computer tests & retests

Audio-Visual

Manages AV center in terms of overall technical responsibility
Evaluates in terms of departmental needs, and approves purchase of AV equip.
Tests demonstration AV equip., reviews staff recommendations, & on basis of own & staff reactions, recommends for purchase
Provides consultant services to other departments regarding AV equip. & materials
Writes detailed justification to accompany recommended purchases of expensive AV equip.
Allocates & schedules scarce equip. & materials in AV cent.

LIBRARIAN or SPECIALIST

Supervises construction of community-oriented displays in branch lib.
Recruits volunteers for lib. by meeting with individuals & groups
Conducts programs sponsored by the lib. for agencies, organizations & the community as a whole
Schedules special workshops in lib. by arranging for facilities & materials to be available
Designs & develops training programs on reference activities for nonprofessional staff
Adjusts or refers via telephone, personally, or by letter complaints about library services and programs
Assigns volunteers in lib. & monitors progress & activities
Serves as panelist on local radio station & discusses lib. affairs
Screens requests for use of lib. meeting rooms to determine appropriateness of request

Selects from standard sources all recorded tapes, discs, etc. for local public lib.
Designs & plans shelving & departmental arrangements
Modifies departmental budget needs & requests on basis of overall lib. budget needs
Produces discussion guides for films, records, and other AV materials
Designs & develops workshops on reference services for professional librarians
Conducts workshops on reference services for professional librarians
Keeps informed of developments in professional field by regularly reviewing literature & through discussions with colleagues
Participates in professional activities & associations by (a) attending meetings, conventions, etc., (b) reading professional journals, (c) discussing professional duties & responsibilities
Selects art prints for display in PL
Identifies community resource persons for involvement in lib. programs and makes specific requests of individuals to serve as speakers, participants, etc.
Completes questionnaires from state, federal, municipal & other sources requesting statistical or other information about lib.
Develops promotional ideas for library
Visits lib. schools to recruit & interview students for professional positions in lib.

SENIOR LIBRARIAN

FA 1 - Administration

Establishes with approval of Board the basic objectives & policies of public lib.
Approves or modifies suggested administrative, structural, or staff changes in lib. programs & activities
Approves &/or disapproves requests for changes in program emphasis, hours, staff arrangements, etc. in branch lib.
Determines general objectives for new lib. programs

(Senior Librarian, cont'd)

(FA 1 - Administration)

Serves as liaison between branches & main lib. in terms of personnel relations, lib. collection, & other matters
Screens materials of possible interest to Board members & causes materials to be transmitted to members
Approves &/or disapproves requests from branch lib. for materials, facilities, etc. above a minimum amount
Conducts weekly staff meetings of dept. heads to review problems, progress, needs, & new developments in lib.
Instructs staff to gather data & information for "friends of library"
Prepares agenda for staff meetings with department heads
Submits & defends to Board annual budget for lib.
Meets informally with selected Board members to persuade & interest them in special needs & ideas of PL
Confers prior to Board meeting with chairman about agenda & plans for monthly Board meeting
Observes activity, talks to staff & pat. & generally offers suggestions for improvement of lib. services during visits to branch lib.
Determines upon receipt of reports, statistical studies, etc., if reports are to be (a) released (b) referred to Board (c) reviewed & evaluated internally (d) modified (e) set aside for future action
Meets & discusses with community groups, procedures, policies, & programs that generally influence future of lib.
Attends lib. Board meetings as major representative of lib. staff & answers questions from Board
Recommends to lib. Board basic policy procedures for lib.
Provides supervision & management of lib. staff in professional & technical areas
Discusses with Board prior to submission, general budgetary needs for lib.
Adjusts sensitive & top-level complaints regarding lib. services, procedures, & policies

FA 2 - Selection and Acquisition

Evaluates & approves or disapproves recommendations regarding collection building
Establishes policy for what constitutes sufficient information on subject order requests from member lib. in system
Establishes lib. procedures & policies with regard to collection building, & acquisition & withdrawal
Consults with departmental librarian over nature, priority, & complexity of book order requests
Evaluates jobber policies, procedures, & programs & recommends changes when appropriate & in the best interest of lib.
Solicits gifts for lib. in areas for which budget expenditures are not permitted or available
Evaluates lib. collections in terms of changing community interest & develops procedures to meet changing needs
Supervises staff in procedures & policies on collection building

FA 3 - Cataloging and Processing

Writes code book to govern cataloging policies & procedures for local PL
Identifies & implements changes in classification policies & procedures for lib.
Establishes processing policies for lib.

FA 6 - Patron Services

Schedules & supervises publication of annual list of serials & journals in collection
Designs & develops programs sponsored by the lib. for agencies, organizations, & the community as a whole

SENIOR LIBRARIAN or SENIOR SPECIALIST

Professional

Selects editors to edit & assemble articles for professional journal
Participates in scientific conferences to increase knowledge of scientific field
Selects topics or themes for articles to be included in bulletin for professional librarians
Conducts periodic workshops for department heads of lib.
Appraises & sets value on rare books in lib. collection

General Management

Conducts periodic staff meetings to discuss dept. procedures & policies
Assigns supervisory & program responsibilities to staff
Assigns staff to develop specific objectives & new programs from general objectives
Provides written structured evaluation of professional employees annually to personnel manager
Interviews applicants for departmental professional positions
Edits narrative & statistical reports received from departmental chairmen before compiling librarywide annual report for submission to Board
Approves staff manuals & materials setting forth procedures & policies
Requests from staff reports describing programs and integrates data supplied into larger reports & studies
Approves termination papers for staff & notifies person affected
Approves travel for lib. staff
Designs & develops procedures for transferring lib. materials from branches to main lib.
Arbitrates interpersonal difficulties between staff & departments within lib.

(Senior Librarian or Senior Specialist, cont'd)

(General Management)

Checks & evaluates lib. programs in relation to professional standards
Establishes general statistical & other reporting procedures for local lib. system
Serves as administrative & technical consultant to other lib. in area
Recommends on basis of time, cost & other factors whether or not library processes be computerized
Visits other libs. to learn of new possibilities, ideas, etc. in lib. operation
Designs, develops, & writes proposals for state, local, & federal funds
Monitors & supervises staff presentations related to lib. programs on radio station

Buildings/Architecture

Conducts comparative evaluative studies of bids & proposals submitted by contractors
Meets with professionals concerning administrative procedures, problems, & policies, in the development of new lib. facilities
Initiates studies concerning location & establishment of branch lib.
Plans building program; submits, discusses, & justifies plan to Board
Selects with advice of interior decorators, architects, & staff members, furniture & furnishings for new lib. additions & buildings
Reviews & recommends to lib. Board building proposals submitted by architects & contractors
Arranges tours for building committee of Board to view new lib. in consideration of building plans for lib.
Supervises, evaluates & accepts or rejects specific building & construction accomplishments of contractors
Serves as liaison between dept. heads & contractors in construction projects
Prepares general building specifications for submission to architects

Budget/Fiscal

Prepares annual fiscal report for lib.
Supervises memorial book fund & other funds for public lib.
Monitors, supervises, & maintains administrative control over retirement program fund for lib. employees
Monitors & relays to unit heads, budget problems & expenditures as revealed by analysis of computer printout of lib. expenditures, encumbrances, etc.
Establishes expenditure periods, & reporting system for lib.
Initiates discussion of fiscal needs with bankers & secures &/or plans anticipation warrants until funds are available
Prepares for lib. Board analysis & recommended action for competing bids for materials, services, etc.

(Senior Librarian or Senior Specialist, cont'd)

(Budget/Fiscal)

Answers questions from city administration, the general public, etc. regarding budgetary plans for local public lib.

Determines budget needs & major categorical amounts for budget for coming fiscal year

Manages & controls budget including major expenditure & transfer of budgetary items

Reviews & recommends insurance programs for lib. equip., facilities, staff, etc.

Confers with city officials over budget presentation of lib.

Confers with municipal authorities over fiscal management & building activities & plans of public lib.

Presents to unit heads budget decisions & instructs unit heads to reduce, expand, or change individual budget accordingly

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